



**EEB Evaluation Committee
Monthly Meeting**

Wednesday, August 1, 2012, 10:00 – 11:30 AM

Department of Energy and Environmental Protection – Holcombe Room, 5th Floor
79 Elm Street, Hartford, Connecticut

Meeting Materials Available at Box.net folder <http://www.box.com/s/q6yfus8mli4dxsra04eo>

MINUTES

Participants:

Committee Members: Amy Thompson (Chair), Jamie Howland, Taren O'Connor, Rick Rodrigue

Public: Art Marcelynas, Cindy Jacobs (DEEP). Geoff Embree, Joe Swift, Paul Gray (EDCs).

Consultants: Kim Oswald, Jeff Schlegel, Tim Cole

1. Public Comment – There were no comments from the public.
2. Building Characterization Study: Assess Alternatives
 - A. No Study for Now
 - B. NMR Conducts Study
 - C. DEEP Intern?

Kim Oswald reported that the primary issue concerns data resources, namely who has the data and how to get it? NMR will charge \$32,000 to complete the study including obtaining building data from every tax assessor in the state. Vision-Appraisal is a contractor that compiles appraisal data for many town assessors but it does not share or sell the data collected. It is uncertain whether all towns will direct Vision Appraisal to share the data. Jamie Howland suggested asking DEEP to send a request to the towns, asking them to instruct Vision Appraisal to share the data. Paul Gray commented that UI has had success obtaining electronic data files from towns when needed. Rick Rodrigue agreed to investigate whether DEEP would be willing to make the suggested request. Ms. Oswald noted that NMR has offered an alternative, which would be to purchase data from a company located in Massachusetts and that has Connecticut parcel data. The advantages are that the data would be available quickly. The downside is that the data would include only houses sold since 1987¹. This means about 10% of properties are not included, which might lead to a bias, most

¹ Soon after the meeting, NMR discovered that it had been mistaken concerning missing data. All residential parcels are available through the 3rd party purchase. Because the needed data could be delivered quickly, without the potential for town refusals and for the same overall cost, the Committee held an electronic vote and determined that purchased data was the most appropriate source. The vote was unanimous.

likely against old houses. The cost for this option would also be approximately \$32,000. For NMR to go with the first option of collecting data the data from the towns may take 3 months or more, however it would not leave the problem of the 10% missing homes. The consensus of the meeting was that time is not urgent. Therefore the preferred choice is to go with the first option and let NMR do the work, while looking to DEEP to provide leverage as needed if some towns are not immediately responsive. Amy Thompson asked Ms. Oswald to get a commitment from NMR on time frame, and to arrange for a scope of work that spells out what data will be delivered. Ms. Oswald suggested that DEEP send letters to the towns before NMR begins contacting them. She agreed to draft the letter. Mr. Rodrigue agreed to work out the details with DEEP. Ms. Oswald noted that the data will have building characteristics but will not include weatherization condition. Art Marcelynas noted that the building characterization data could be used to begin to build a database to support building labeling initiative, should one be undertaken.

3. Weatherization Study

A. HES Vendors Inclusion

Ms. Oswald raised the issue of how the HES program might be linked to the weatherization baseline study. She noted that the proposed budget for the study allows for customers to be offered \$100 for participating. To increase the incentive, the customers could be relieved of the co-pay for an HES audit offered at the same time as the data collection visit. Doing so would increase the benefit for most homeowners. It is unlikely that more than 10% of the 180 homes to be included in the study sample will already have taken part in the HES program in the last 18 months. To increase the incentive for a small number of customers who are ineligible to participate in HES, a gift card could be offered as an option. With respect to the question of which budget pays for the HES, the consensus of the committee was that the HES services should be covered by the HES budget, while the co-pay or gift card incentives would be paid for from the evaluation budget. Based on this agreement, Ms. Oswald was advised to ask NMR to work with companies on coordination between HES and NMR concerning the baseline evaluation. Acknowledging that direct contact between the companies and an evaluation contractor is not normally permitted by the evaluation roadmap, the committee agreed that in this case it would be permissible so long as Ms. Oswald personally participated in such conversations, whether by phone or face to face.

B. Options – Ms. Oswald presented two add-on options for the study to the committee to discuss:

- 1) For \$64,000, NMR would include an assessment of current savings potential in oil and/or gas – heated homes, which would be based on the potential savings available by substitution of existing equipment with high efficiency equipment that uses the same fuel (no fuel switching). The committee agreed that this type of analysis would

be useful in getting baseline information, because it would provide insight into the technical potential future weatherization programs might be designed to address.

- 2) For \$26,000 infrared cameras would be used when assessing the 180 homes in the sample. Ms. Oswald recommended that this expense be included in the budget, as it use can provide a more accurate measurement of wall insulation amounts and quality. She noted that this method does not completely substitute for the less accurate direct inspection methods since infrared cameras require adequate indoor/outdoor temperature differential to be fully effective. Ms. Thompson agreed that the benefit for the cost was great enough that the option should be included in the final budget.

Summarizing the points agreed upon by the committee, Ms. Thompson noted that 1) the study would be conducted and completed by June 2013; 2) the final budget of approximately \$870,000 would be split between 2012 and 2013; and 3) would include the extra HES incentives. Jeff Schlegel noted that Deputy Commissioner Dykes and her team are considering conducting a new potential study to support DEEP's work on the 2014 IRP, which will kick off in July 2013. Therefore the weatherization study must be done by the end of June 2013. There will be no wiggle room. Ms. Oswald and NMR will need to work closely with the companies to see that the purchase orders are issued as quickly as possible, and the work expedited.

Approval for \$32,000 for the building characterization study was also noted.

4. Evaluation Metrics –

- A. Ms. Oswald reported that she plans to distribute a draft list of metrics that would include program budgets, expected savings, and realization rates from recent impact evaluations to assist in prioritizing evaluation studies for the coming year evaluations. Joe Swift indicated that CL&P has the relevant program numbers for the factors above and will provide them. He suggested the numbers from CL&P, UI and the gas programs could be compiled in a joint table, offering a systematic report with statewide numbers. Besides impact studies other issues are important. As an example, Ms. Oswald pointed toward the need for a residential persistence study. In the most recent WRAP/ UI Helps (now known as HES-IE) evaluation, persistence of measures was found to be very different in the HES-IE program than for HES. However the same values had been assumed for both.
- B. Ms. Oswald suggested that the committee needs to consider the issue how the evaluation budget gets set. There are rules spelled out in roadmap, but they have not been followed in the past. The question is how to approach budgeting for the coming plan year. There is some urgency about moving on this before the plan budgets become firm. Mr. Schlegel

commented that the committee should try to have a sense of the required budget size to present by August 8. He noted that everyone involved is aware that the current evaluation budget is too small to support the level of activity required. Adequate evaluation is crucial for policy makers wishing to implement data-driven decision making. In response to a question from Ms. Thompson about whether 3.5% is a good figure to lead with, Mr. Schlegel noted that it is still difficult to say where to start from because it is not yet clear how PURA will treat the expanded budget included in DEEP's Determination. He observed, however, that in Massachusetts 4% of the total budget is earmarked for evaluation.

C. In response to a question about whether it might be possible to conduct an evaluation of C&I behavioral programs comparable to a residential behavioral study, Ms. Oswald commented that not much is known about these programs. There is no standard methodology. Generally speaking, C&I programs are rarely evaluated only in behavioral terms. Even O&M programs usually involve some system or equipment upgrades or monitoring.

5. Monthly Status Report Reports – Ms. Oswald noted that two study reports are out for review: 1) the draft HES Financing Focus Groups study has been posted and comments are due at 5 p.m. August 2nd; 2) the Retro-commissioning /O&M impact study draft has been posted and comments are due at 6 p.m. August 14.
6. Other – Mr. Howland inquired whether the committee can obtain the figures on the companies' own embedded administration costs for evaluation. Mr. Swift noted that the information is available and the breakdowns can be found in plan budget Table C.

Respectfully submitted,

Tim Cole, EEB Executive Secretary